Election Day Guide
For Officers of Election

**Accu-Vote Optical Scanner
and TSX Systems**

**Commonwealth of Virginia
State Board of Elections**

Loudoun County Electoral Board

November 2013

Reminders

- Arrive at the polling place at the designated time: 5:00 a.m. for all-day and AM shift workers, 12:30 p.m. for PM shift workers.

- Be sure to bring enough food and drink for the day along with any medications you may need.

- Once you are at the polling place you may not leave until the Chief Election Officer has dismissed you. Please be patient in the evening.

- Voting:
  - **All-day workers not registered to vote in the precinct where they work must vote by absentee ballot.**
  - All-day workers registered to vote in the precinct where they work may vote *while the polls are open* or by absentee ballot.
  - Shift workers registered to vote in the precinct where they work may vote after (AM) or before (PM) their shift, during their shift if necessary *while the polls are open,* or by absentee ballot.
  - Shift workers not registered to vote in the precinct where they work may vote *at their precinct* before (PM) or after (AM) their shift or by absentee ballot.

- Voters are first! Please limit conversations if voters are waiting. Non-voters should be visiting only briefly.

- Do not eat or drink near the laptops, ballots, or voting equipment.

- **Leave Your Politics at Home! DO NOT discuss politics** with voters, party or campaign reps, or your fellow election officers.

- Voters are allowed to wear buttons, t-shirts, and caps but are not allowed to engage in electioneering while in the polling place.

- Voters are allowed to take sample ballots and campaign materials into the voting booths.

- Even a voter who has no ID should not be turned away.

- Always be courteous and professional.

- Be sure you have signed everything you need to sign before you leave. Refer to your "what to sign" card issued by the Chief.

- Make no assumptions … if you are not sure about something, ask the Chief or the lead officer in your area.

Checklist for the Pollbook Officer:
How To Check In a Voter

1. **Ask for the voter's ID.**

   Most voters will have ID ready. For those who do not have ID ready, *ask, don't demand:* "May I please see an ID" or "Do you have your identification?"

   Be sure that the ID is one of the required types. See page 4 for a list of common ID's.
   Note: The What If Guide, problem 1, and the Voter Identification summary contain complete lists. These are provided with each laptop pollbook.

   What If the Voter Has No ID? Send the voter to the Help Desk. The officer at the Help Desk will explain the options to the voter. Their choices will be to return with an ID or to vote with a provisional ballot. The provisional ballot will be counted if the General Registrar receives a copy of the voter's ID by noon on the Friday after the election.

   Under no circumstances should you send a voter away to get an ID until the options have been explained.

2. **Use the ID to look up the voter in the electronic pollbook.**

   You do not need to type the voter's entire name.

   Start by typing the voter's last name until the list is narrowed to a manageable number. Then type a comma, a space, and the first letter of the first name.

   See page 5 or the What-If Guide for what to do if you see ⚠️ or **AB** next to a voter's name.

3. **Click on the voter's name** to display the check-in screen.

   See page 5 for explanations of the Voter Messages that may be displayed at the bottom of the check-in screen.

4. **Return the ID to the voter.**
   Note: Be aware that the ID presented by the voter may not have the address shown on the check-in screen. You will ask the voter to state his or her address for the record. The address stated by the voter is the address that should match the address in the pollbook.

5. **Ask the voter to state his or her name for the record.**

6. **Ask the voter to state his or her current residence address.**

7. **Compare the stated address to the address in pollbook.**
   If the stated address is different from that in the pollbook, the voter should be sent to the Help Desk. The resolution depends on when and where the voter moved. See the What If Guide, problems 3-7.

8. **Repeat in a clear voice the voter's last name, first name, and address.**
   Note: This step is especially important if party or campaign reps are seated behind you to monitor the polls.

   If the voter is challenged, call the Chief or pollbook lead.

9. **Be sure the voter's status is "Ready to Check In."** If not, call the Chief or pollbook lead.

10. **If the voter completes any forms at the check-in station**, click on the appropriate box or boxes under the Election Day Flags.

11. **Click on the "Check Voter In" button.**

12. **One more time, check to be sure that you have the correct voter on the screen.** If the wrong voter is on the screen, click on "**Cancel**" and look up the correct voter. If the correct voter is on the screen, click on "**Confirm**."

13. **Verify the check-in** by looking to see that the voter's name is highlighted in red on the list of registered voters and the symbol is next to the name.
    Note: If you don't see the symbol or the red highlighting, click on the voter's name and repeat steps 9 to 13.

14. **Issue the voter a ballot ticket** and send the voter to the next station when the check-in is confirmed.

15. **Ask for the next voter in line.** Keep the line moving but do not rush. Accuracy is more important than speed. It is very important to be certain that you are checking in the right person.

Acceptable Forms of ID (Selected)

ID Type
Virginia Voter Card
Valid Virginia Driver's License (within 30 days of expiration)
DMV-Issued Photo ID Card
U.S. Passport or Passport Card
Military ID
Social Security Card
Medicare or Medicaid Card
ID issued by the Federal Government, the Commonwealth of Virginia, or a local government within Virginia
Valid student ID card (with photo) from an institute of higher learning in Virginia
Valid employee ID with photo
Virginia Concealed Handgun Permit
Birth Certificate if issued by a government entity
Current Utility Bill or Bank Statement with voter's name and address
Current Government Check with voter's name and address
Current Paycheck with voter's name and address

Symbols Found Next to Voter's Name in Pollbook

⚠️

If you see this symbol, look at the bottom of the Check-in screen for one of the following Voter Messages:

? (Marked for Address Confirmation) or (Inactive)

The voter failed to respond to an inquiry relating to a change of address or the post office has returned mail addressed to the voter. A voter marked for address confirmation will be designated as inactive after a period of time.

If this voter appears at the polls and his or her address has not changed, he or she must complete an Affirmation of Eligibility form before voting. If the voter's address has changed, action depends on when and to where the voter moved. See the What If Guide, problems 3-7.

Inactive voters should be sent to the Help Desk to resolve the situation.

F (Federal Only Ballot)

This voter resides overseas and may vote only in Federal elections. Any voters with this designation who appear at the polls are issued a ballot that shows just the Federal races. Therefore, this voter should be sent to the Help Desk for assistance.

AB

The voter has been issued an absentee ballot. See the What If Guide, problem 19, for absentee ballot situations. If a voter with **AB** by his or her name appears at the polls, they should be sent to the Help Desk for assistance.

Election Officer Tasks:
Greeter

- Stand at the entrance to the building or the entrance to the polling area, whichever is most appropriate at the precinct.

- Welcome voters to the precinct.

- Ask voters if they are sure they are in the correct precinct. Use the ViewPad or the precinct map to look up the voters who are unsure. If the voter shows you a voter card, be sure it is current; many precincts have been split or reconfigured within the last three years.

- Remind voters that they are required to have ID and ask them to have it ready when they reach the front of the line.

- Use the handout to explain the ID law. Please do not engage voters in discussion or debate over the merits of the ID law. Remember that the photo ID law does not go into effect until July 1, 2014.

- If election pages are helping as greeters, be sure they understand their tasks and assist or direct them as necessary.

- If you are working at the entrance to the building, monitor the activities outside and inform the chief of any situations that develop.

Election Officer Tasks:
Ballot Officer

- Collect the ballot ticket and offer the voter a choice of the paper ballot or the TSX (touch screen).

- Provide instruction to voters who request it.

- For voters using a paper ballot, collect the ballot ticket, issue a ballot *and privacy sleeve,* and direct the voter to the voting booths (or the Voting Booth Officer).
  Note: If it is raining, ask the voters to please do everything possible to keep their ballots dry.

- Inform voters if the ballot is two-sided.

- If a ballot is spoiled due to overvote or other reason, have the voter fill in all circles for privacy, then issue a new ballot (see page 9 for more information).

- Direct voters who choose to vote electronically to the TSX (touch screen). If there is a TSX Officer, voters should retain their ballot ticket and give it to the TSX Officer. If there is no TSX Officer, issue and retrieve the voter access card and provide instruction on using the touch screen if the voter requests it.

Ballot Control

- Be sure ballots are in a secure location and are never unattended.

- Open one package of paper ballots at a time unless you are expecting a large number of voters when the precinct opens (Presidential elections, for example). Riffle the ballots to be sure none are stuck together. Count and double-count.

- Use the Ballot Record and Electronic Pollbook Summary Report (see the example on the next page) to record the actual number of ballots in each opened ballot package and any spoiled, void, or provisional ballots throughout the day.

- If additional ballots are provided to your precinct after the polls open, enter the number of ballots received on the Ballot Record Report.

- See the table on page 9 for information on distinguishing among provisional, spoiled, and voided ballots.

Ballot Record and Electronic Pollbook Summary Report

Return in Envelope 2

Precinct:
Ballots Provided:

General and Special Elections
November 5, 2013

1. Opened Packages of Ballots

Column A			Column B			Column C		
Package Number	Initials	Ballots in Package	Package Number	Initials	Ballots in Package	Package Number	Initials	Ballots in Package
1			12			23		
2			13			24		
3			14			25		
4			15			26		
5			16			27		
6			17			28		
7			18			29		
8			19			30		
9			20			31		
10			21			32		
11			22			33		

1a. Actual Count of Opened Ballot Packages (Columns A, B, and C)	
1b. Unopened (Sealed) Packs (_____) x 100)	
1c. Total Ballots Received (Add 1a and 1b and enter on SOR Line 1)	

2. Ballots Received from Electoral Board While Polls Open (Enter on SOR Line 2A):	3. Locally Reproduced Emergency Ballots While Polls Open (Enter on SOR Line 2B):

4. Unused Ballots After Polls Close	4a. "Loose" Unused Ballots	
4b. Unopened (Sealed) Packs (_____) x 100)	
4c. Total Unused Ballots (Add 4a and 4b and enter on SOR Line 4)	

5. Adjustments	5a. Spoiled Paper Ballots	
5b. Voided Paper Ballots (Enter on SOR Line 21A)	
5c. Total Spoiled/Voided Ballots (Paper Only) (Add 5a and 5b and enter on SOR Line 5)	

6. Tally of Provisional Ballots Issued: (Enter on SOR Line 6):	7. Tally of Voided TSX Votes: (Enter on SOR Line 21B)

8. Electronic Pollbook Summary (Numbers Must Agree on All Precinct Laptops)

	Before Polls Open	After Polls Close		Before Polls Open	After Polls Close
a. (Not Used)			d. Absentee Count		
b. Voter Count			e. Provisional Count		
c. Checked In Count (Enter "After Polls Close" Number on SOR Line 20)			f. OP Count		
			g. % Turnout		

September 25, 2013

Ballot Record and Electronic Pollbook Summary Report

Paper Ballot Situations

Type of Ballot	Explanation	What To Do …
Spoiled	Voter makes an error in voting. Ballot is damaged.	Have voter fill all circles. Mark ballot "spoiled." Place ballot in Envelope 4. Enter tally on *Spoiled Ballot* section of Ballot Record Report. Give voter new ballot.
Void	Voter decides not to cast ballot. Voter leaves polls before casting ballot. Voter leaves polls with ballot.	Mark ballot "void." Place ballot in Envelope 4. Enter tally mark on *Void Ballot* section of Ballot Record Report. Do *not* issue a new ballot. Record on Incident Report.
Provisional (Green Envelope)	Voter's name not in pollbook and Registrar cannot be reached. Voter's name not in pollbook and Registrar cannot confirm person is registered to vote. Absentee voter did not receive or lost ballot. Voter does not present appropriate ID. Voter is not qualified or in wrong precinct but insists on voting regardless. Polls remain open past 7 p.m. on court order.	Refer to What If Guide, problems 12 and 20. The Chief Election Officer or a designated assistant will handle provisional ballots. Enter tally mark on *Provisional Ballot* section of Ballot Record Report.

Paper Ballot Instruction

If a voter needs instruction on the use of the optical scanner:

■ Use a sample ballot or the Loudoun County Voter Instruction Guide brochure.

■ Explain that each section of the ballot represents an office or issue to be voted on.

■ Show the voter the oval figures opposite the names of the candidates. Instruct the voter to use the marking pen in the voting booth to completely fill in the oval figure next to the candidate or issue of his or her choice. Caution the voter not to use an "x" or a checkmark.

■ Caution voters not to mark more than the number to be elected for an office and inform them that they do not have to vote on every office and issue.

■ Inform voters that if they make an error marking the ballot, they may return the ballot in exchange for a new ballot. In such cases, voters should fill in all ovals on the ballot to preserve the secrecy of their ballot.

■ Tell voters about the privacy sleeve and remind voters to take the ballot — unfolded — to the scanner when they are done voting.

Write-Ins

■ Instruct the voter to fill in the oval opposite the write-in position on the ballot. Then write in a name on the line provided. The vote will not be recorded if the oval is not filled in.

Note the following:

— A write-in vote is a ballot cast for any person other than the candidates listed for a particular office.

— A write-in vote is not permitted for any office in a primary election.

— The voter may cast as many write-in votes as the number allowed for that office.

Election Officer Tasks:
TSX Officer

- Collect the ballot ticket.

- Offer a voter who needs instruction the Loudoun County Voter Instruction Guide brochure.

- Encode a voter access card (see page 13 for details):
    — Do not encode voter access cards ahead of time.
    — Do not issue an access card to a waiting voter until the TSX unit is available.
    — Never leave access cards or the encoder unattended.
    — Wear the encoder around your neck. If it drops onto a hard floor surface, it probably will break.

- Activate the unit with the access card. Point out that the counts on the unit will increase by 1 upon voting. Be sure the instruction page is on the screen.

- Stand near the TSX unit but in a location where the voter is assured of privacy.

- If necessary, explain:
    — How to select from the viewing options (normal text or large text, color screen or high-contrast black and white), and how to move around the ballot by touching previous, back, or next at the bottom of the screen. The page counter at the bottom center of the screen shows the voter's progress through the ballot.
    — How to make and change selections by touching the appropriate lines. Touch a line to select, touch again to deselect.
    — How to navigate on the summary page by touching the arrows at the top and bottom of the screen and how to touch an undervoted or incorrectly voted race to return to it and make a change. Then touch Summary to return to the Summary screen.
    — Overvoting is not possible on the TSX.
    — Touch "Cast Ballot" to vote. This irrevocably ends the voting and ejects the access card.

- Remind voters to remove and return the access card after casting their vote.

- When a voter leaves the TSX, check to see if the ballot has been cast, that the card has been removed, and that no campaign material has been left behind.

- If a voter has left a card in the unit and walked away without casting his or her ballot, first attempt to locate and inform the voter. Do not take any action on the TSX. Notify the Chief immediately.

- When the polls close, account for all voter access cards and the encoder. Return these items to the Touch Screen Items envelope and return the Touch Screen Items envelope to the voting equipment supplies container.

Write-Ins

Instruct TSX (touch-screen) voters who ask, to touch the write-in selection for the office they want to write in. When the keypad appears on the screen, type a name by touching the keys. When done, touch "Record Write-In" to return to the ballot.

Note the following:

— A write-in vote is a ballot cast for any person other than the candidates listed for a particular office.

— A write-in vote is not permitted for any office in a primary election.

— The voter may cast as many write-in votes as the number allowed for that office.

Voter Instruction

Try to instruct the voter without viewing the TSX screen. If the instruction requires that the TSX screen be viewed, two officers, one representing each party, should be present. If possible, the officers should leave before the voter makes any choices. If the voter needs assistance, a Request for Assistance form is required.

Power Failure or Mechanical Difficulty

The Chief's guide provides information on the TSX unit's power indicators as well as some basic troubleshooting. Do not attempt to make any repairs to the TSX unit. Call the machine technicians.

The Chief should call the Electoral Board immediately if there is a power failure of any duration while the polls are open.

Encoding Access Cards

Press the ON button.

Insert the voter access card (arrow first, writing and gold seal facing the back of the encoder.)

When the encoder reads CREATE?, press YES.

When encoder reads CLEAR?, remove the encoded access card.

Press the OFF button. (The encoder will turn itself off after a few minutes regardless.)

Access Card Options

Press the * button to cycle through the access card options below. (Note: the button can stick and repeat, so if you miss your choice, just cycle through the options again.)

CREATE? = Regular ballot.

M CREATE? = Magnified ballot on screen.

VM CREATE? = Magnified ballot on screen with audio instructions.

VH CREATE? = Hidden ballot with audio instructions.

Clearing a Card

The TSX clears the card after each voter casts his or her ballot. However, if necessary, you can clear a card. Press the ON button. Insert the card. If the card is active, encoder reads CLEAR?. Press YES. When encoder reads CREATE?, card is deactivated.

Did You Know?

A voter using the TSX could decide, for any reason, that he or she does not want to cast his or her ballot on the electronic device. If this happens, the Chief has been instructed on how to cancel the TSX ballot and retrieve the voter access card without a vote being cast.

If the voter who asked to cancel the TSX ballot casts a paper ballot on the optical scanner, no action other than canceling the TSX ballot is required.

If a voter abandons the TSX and leaves the polling area without casting any ballot, the Chief must cancel the ballot on the TSX and record the vote as void on the Statement of Results and the Ballot Record Report. The situation should be noted on the Incident Report.

A Chief who needs assistance in canceling a TSX ballot should call the Electoral Board.

Election Officer Tasks:
Voting Booth Officer

- Direct voters with ballots to the first available voting booth. If all booths are occupied, voters can use tables or any other surface available in the polling area if they choose, but they may wait for a booth if they wish. Be sure all voters use the proper marking pen no matter where they vote.

- If a ballot is spoiled due to overvote or other reason, have voter fill in all circles for privacy, then direct the voter to the Ballot Officer, who will issue a new ballot (see the table on page 9).

- Point out the optical scanner and remind voters to take completed ballots to the scanner.

- Ensure that voters have removed their ballots from the voting booth after voting. If necessary, remind a voter to take the ballot to the scanner before leaving the polling area. If a voter has left a ballot and is no longer in the polling area, notify the Chief immediately.

- Be sure working pens are in voting booths at all times.

- Remove campaign material left in voting booths.

- Shuttle privacy sleeves from the optical scanner back to the ballot officer as needed.

- Be sure voters using the touch screen are directed to the TSX location in the polling place.

Note: Voters are permitted to take sample ballot guides and campaign material with them into the voting booth.

Voter Instruction

Try to instruct the voter without approaching the voting booth. If a voter requires instruction in the voting booth, two officers, one representing each party, should be present. If possible, the officers should leave before the voter marks the ballot. If the voter needs assistance, a Request for Assistance form is required.

Election Officer Tasks:
Exit (Optical Scanner) Officer

- Stand next to or behind the scanner. Leave enough space to ensure the voter's privacy but be close enough to be able to react to problems and view the scanner's message window if necessary. You also need to be able to prevent a voter from leaving the polling area with his or her ballot.

- Direct the voter to insert the ballot — unfolded — straight into the scanner, laying it flat on the arrow and pushing it forward. The voter should release the ballot as soon as the scanner accepts the ballot.

- If the voter uses a privacy sleeve, direct the voter to grasp the area below the dotted line on the sleeve and slide the folder forward until the scanner accepts the ballot. The ballot should be loose in the sleeve.

- The ballot can be inserted on either side, forward or backward.

- Do not take a ballot from any voter under any circumstances.

Scanner Awareness Is Very Important

If a ballot is rejected by the scanner, instruct the voter to turn the ballot over and try again. If the scanner does not accept the ballot after several tries, the voter needs to spoil the ballot and mark a new ballot (see instructions on page 8).

If a ballot jams in the scanner, you need to read the message on the scanner's message window to determine if the ballot is counted or uncounted. The message is displayed for 20 seconds, so you need to react quickly. Read the message, then inform the chief or assistant. To access the jammed ballot, unlock the front panel access door, slide the scanner forward a few inches, then either retrieve the ballot or allow the ballot to fall into the ballot container, depending on the message:

- Counted Ballot Jammed in Reader – Allow ballot to fall into container.

- Jammed on Accept, See Official – Retrieve ballot and insert ballot into scanner again.

- Ballot Not Read, Please Re-insert – Retrieve ballot and insert ballot into scanner again.

- Returned Ballot Jammed in Reader – Retrieve ballot and insert ballot into scanner again.

Slide the scanner back into place, close and lock the front access panel, and continue voting. Inform the chief if you do not know if a ballot is counted or uncounted, or if an uncounted ballot fell into the ballot box by mistake.

- Ensure that TSX voters have surrendered voter access cards before leaving the polling area. Return voter access cards to the TSX officer.

- If the scanner rejects a ballot or jams, check the message area on the scanner before taking action (see "Scanner Awareness" on page 15).

Overvoted Paper Ballot

All optical scanners in Loudoun County are programmed to initially reject a ballot that contains overvote(s). The scanner will alert the officer supervising the scanner that a race on the ballot has been overvoted.

When such a ballot is rejected by the scanner, prior to removing the ballot, the election officer must protect the privacy of the ballot by covering the ballot with the overvoted ballot privacy sheet, found in the scanner's carrying case, and then discretely inform the voter about the overvote (use the handout shown below).

The scanner's message window tells you which race has an overvote

The election officer must inform the voter of the following options:

- The election officer can override the scanner so that the ballot is accepted by the scanner. The overvoted race(s) will not be counted. All other valid votes will be counted.

NOTICE TO VOTER

YOUR BALLOT HAS BEEN REJECTED BECAUSE OF AN APPARENT OVERVOTE FOR AN OFFICE OR ISSUE ON THE BALLOT FOR THIS ELECTION.

INSTRUCTIONS TO VOTER

IF YOU INTENTIONALLY VOTED FOR MORE CANDIDATES OR BALLOT RESPONSES THAN YOU WERE ENTITLED TO, THEN ASK THE ELECTION OFFICIAL WHO GAVE YOU THIS NOTICE TO PLEASE ALLOW THE VOTING EQUIPMENT TO ACCEPT YOUR BALLOT WHEN IT IS RE-FED THROUGH THE MACHINE.

IF YOU DID NOT INTENTIONALLY OVERVOTE, THEN TELL THE ELECTION OFFICIAL WHO GAVE YOU THIS NOTICE THAT YOUR BALLOT IS SPOILED AND YOU NEED A NEW ONE. IF YOU THINK THAT YOU DID NOT OVERVOTE AND WANT THE ELECTION OFFICIAL TO SHOW YOU WHERE THE EQUIPMENT IS READING THE OVERVOTE, YOU SPECIFICALLY MUST ASK THE ELECTION OFFICIAL TO DO SO.

SBE 8/01

Hand the Voter This Notice if the Scanner Indicates an Overvote

■ The election officer can remove the ballot from the scanner, with no votes having been counted. The original ballot is marked as spoiled (see page 9 for instructions) and the voter is given a new ballot.

The voter then needs to inform the election officer of his or her choice for handling the overvoted ballot and the election officer must carry out those instructions.

If the voter chooses to cast the ballot with the overvote, follow the instructions in the box on this page.

When assisting a voter with an overvoted ballot, the election officer must not look at or review the ballot unless the voter specifically requests assistance with identifying and correcting the overvote.

Power Failure or Scanner Mechanical Difficulty

The optical scanner's internal battery will allow the scanner to continue to count ballots during a power surge or power failure.

> **How To Cast the Overvoted Ballot**
>
> If the voter chooses to cast the ballot with the overvote:
>
> 1. Unlock and open the drop-down front panel access door on the ballot box.
> 2. Press the Yes button on the front of the scanner.
> 3. Close and relock the front panel access door on the ballot box.
>
> **If the ballot has been removed from the scanner:** Insert the ballot again. When the 'overvoted race' message is showing on the display, follow the instructions above.

If there is a prolonged power failure or a mechanical problem with the scanner, instruct voters to put ballots into the emergency ballot box located on the side of the ballot box.

Note: instruct voters to drop the ballot down into the ballot box to keep the ballot from being inadvertently creased. Ballots in the emergency ballot box can be fed into the scanner at any time after the power returns to normal.

The Chief should call the Electoral Board immediately if there is any type of power failure in the polling area.

Emergency Ballot Box